

# Conference Record

Revised 11/8/06

**Meeting Date:** October 24-26, 2006

**Meeting Location:** Hotel Santa Fe, Santa Fe, New Mexico

**Attendees:** Ken Baker, John Bauckman, Dee Boyd, Gene Buck, Kyle Carr, John Elrod, Doug Fleiss, Bob Gair, Tonya Hinojosa, Gary Hoe, Gary Horn, Billy Ray Johnson, Steve Mattair, Dennis McDermitt, Roger Olson, Marilyn Overman, Steve Patterson, Dave Peebles, Roberto Reece, Bill Robinson, Ken Rowe, Ruth Ann Smith, Dan Soper, Norm Ayers.

**Subject:** Meeting Notes from the October 2006 CAIS & CostWorks User Meeting at Santa Fe

## **Day 1 - Tuesday October 24, 2006**

### **A. Introduction and General Discussion Section:**

1. Gary Hoe is using Maximo on the web.
2. Gary Hoe likes having CAIS available on the web and plans to shut down the old CAIS version 5.3 on his PC.
3. Steve from Pantex says that CAIS tracks \$600,000,000 in assets for Pantex.

### **B. Best Practices Section:**

1. Kyle from LANL is trying to generate new road models. Kyle must roll-up to a number, set by his local accounting organization, and cannot reconcile with CAIS, CostWorks or FIMS. Kyle must use FIMS or his local accounting system, but not both. Kyle needs better visibility over OSFs, that OSF's are not well documented, and that he will have to push back on accounting. (Version 2.0 of CostWorks contains many OSF assemblies under G2010 dealing with roads, pavements, bituminous paving, curbs, and berms. For example, there are 83 assemblies just dealing with bituminous paving. The latest issue of the CostWorks seminar workbook contains two specific exercises for estimating an RPV for Fencing and Tanks. The methodology in these exercises would also apply for roads. Give it a try. [kcb])
2. Dan Soper recommends hiring ICC certified inspectors.
3. Dan Soper recommends that Field sites look at the International Code Council website to find and hire inspectors.
4. Steve Patterson from Pantex uses Microsoft Access as a reporting tool with the CAIS database to look for availability of equipment and for deferred maintenance.
5. Tonya, from Pantex, wondered if CAIS had a spell checker.
6. Los Alamos (Gene Buck) wants ad-hoc reporting in CAIS.
7. John Bauckman (NNSA) likes the design of the FIMS website.
8. John Bauckman (NNSA) likes the "list of enhancements" posted on the FIMS website and says that CAIS should do the same.
9. Gary Horn – DOE is now green as a federal property asset and must stay green. (We should post Gary's presentation to the CAS website).

10. Steve Patterson from Pantex gave a presentation on “Project Formulations”
  - Software tools utilized: CAIS, MS Access Queries, MS Excel, email
  - CAIS is being used for equipment tracking and deferred maintenance activities.

C. CostWorks Sustainment Section:

1. Kyle from LANL wants an AVERAGE column in the CostWorks Sustainment Report (The average calculation would apply to the Sustainment Ratio in the Summary Cost Table [kcb&rg]).
2. Gary Horn does not want INFLATORS in the Sustainment Model while John Bauckman was in favor using INFLATORS (CFO values) instead of RS Means percentages. They will discuss their differences and agree on a common approach. John Bauckman wants to separate DEFERRED MAINTENANCE in the Sustainment Model. [Bob Gair from RS Means stated on 11/2/06 that the “deferred maintenance value is generated in CAIS, and Means looks at fixed values in our FM&R database of PM and M&R costs to generate the Sustainment Report, therefore that request is not currently feasible percentages]

**Day 2 – Wednesday October 25, 2006**

CAIS Web Training Section:

1. Dennis McDermitt wants CAIS Web to enforce DOE 203 Guidance for passwords. (Norm will contact David Arnoult (EES) and ask for recommendation on implementing DOE’s password policy).
2. Gene Buck wants to implement enhancement #1050, 1052 and 1053.
3. There were several requests to “make the screen fit”, to “Lock the Headers” on the screen, to use more drop-down lists, and to eliminate horizontal scrolling (but keep vertical scrolling).
4. Pantex stated that they enter 200 transactions per week and that CAIS required “too much scrolling” and that data entry was a slow process.
5. Pantex wants to implement enhancement 1054 and 1055.
6. Norm wondered if the SITE ID between CAIS and FIMS could be standardized. (Ken Rowe said that he would provide a usable solution for this problem).
7. Norm thought that the MODEL TYPE field is too long and should be wrapped or scrolled. See enhancements 1028 and 1043.
8. Dan Soper requests that changes to the FIMS database automatically update the CAIS database. Archiving may have to be employed when FIMS fields are deleted.

9. There was a question from John Elrod about the EXCESS DATE field (e.g., date, year) with regard to interfacing FIMS and CAIS. We must speak with Gayle Smith about this field. (Ken Rowe will investigate).
10. There is some confusion about the definition of the MISSION field in CAIS and FIMS. (Ken Rowe will investigate).
11. Norm should revisit common fields in CAIS and FIMS and make sure that CAIS is up-to-date with FIMS.
12. John Bauckman wants a new, read-only field in CAIS Web called MISSION DEPENDENT PROGRAMS that will access its live counterpart in the FIMS database.
13. Another request to “lock headers” on CAIS screens.
14. Norm wondered why CAIS web uses blue/grey screen fields and objects instead of the industry standard bold/dim option (in Microsoft and Apple). (Norm recommends using Section 508 for software best practices).
15. Users were complaining that they spend too much time scrolling horizontally in CAIS web.
16. Dan Soper asked that the TYPE SEARCH screen be modified so that the screen fields are organized in a hierarchical order. Also, wrap text. (This item is already on the enhancement list/Ken).
17. Steve from Pantex says that CAIS version 5.3 shows TOTALS at the bottom of the TYPE SEARCH screen, but that CAIS Web does not do this. (Create a new enhancement for this request/Norm).
18. Dan Soper stated that the FILTERING button on the TYPE SEARCH screen disappears (a bug?). (Create a bug report for this item/Norm).
19. Steve from Pantex says that there is no anchoring or highlighting of the selected line in the TYPE SEARCH screen (but CAIS v5.3 does this). (Create a new enhancement for this item/Norm.).
20. Gary Horn requested that a RECAST button be placed on the IUDetail Save screen. (Create a new enhancement for this item/Norm.)
21. Gary Horn noticed that the rounding of the REPLACEMENT COST and OFFICIAL COST fields on the IUDetailSave screen was different. (small bug, Ken will fix.)
22. Ken Rowe asked how many (in the group) were using CostWorks software. No-one said that they were actually using it (some were playing with it). One user said that he was using FIMS, Passport and SAP as an alternative to CostWorks. (CAIS users are using the CostWorks models to calculate the FCI for WBS/System deficiencies. The CostWorks

models provide the system percentages of the total RPV to estimate the FCI. Lawrence Livermore has used in-house staff and CostWorks to estimate or verify their RPVs. They have finished all their buildings and OSFs are now under study. The uniqueness of the OSF RVP models and the future Sustainment Models will drive future CostWorks use by all DOE sites. We are patient but are still puzzled why more NNSA sites are not using CostWorks while LLNL is marching ahead implementing CostWorks. [kcb]).

23. Work Order/Equipment Inventory Systems being used by the attending sites:

Passport is being used by: Pantex, LANL, SRS

Maximo is being used by: NTS, Sandia

SAP is being used by Y12.

24. Dan Soper asked that headings on the COMPLETE INSPECTION UNIT REPORT be fixed and aligned with the corresponding data. (Create a new enhancement for this item/Norm).

25. Dan Soper said that the RECASTING SITE function does not update all CAIS reports and that this is a bug (e.g., every report should have the same bottom-line numbers). (This item is already on the enhancement list/Norm).

26. Dan Soper said that the SITE ASSET COST REPORT is confusing in the way in which it adds numbers (and should be simplified or made easier to understand). (This item is already on the enhancement list/Ken).

27. There was a question about when the FIMS UPLOAD program (in CAIS) should take place during the year. For example, should the FIMS UPLOAD be allowed to run when the FIMS database is locked or during non-updateable time periods. When should the FIMS UPLOAD program be allowed to run and update the FIMS database? (Ruth Ann will place this information in the new CAIS Web User Guide).

28. Dennis McDermitt and Dan Soper asked that CAIS and FIMS be brought up in the same TREE STRUCTURE? (This means that the FIMS Ad-Hoc Reporting application and the CAIS Ad Hoc Reporting application may be combined).

29. John Bauckman asked that we add the MISSION DEPENDENT PROGRAM field to the TOTAL REPAIR COSTS REPORT. (Norm will call John B on this item and discuss).

30. John Bauckman asked that a new user role be added to CAIS called HEADQUARTERS USER. Authorized uses of this new role would have the ability to view all data, could filter data by PROGRAM OFFICE.

31. John Bauckman said that the NNSA goal for the year 2030 is for DOE to “get smaller” by reducing the number of properties/facilities. NNSA is currently looking at FIMS data to support this initiative and may also want to look at CAIS Web data in the future.

32. Another request was made for the IU Entry screen to improve the speed of data entry and to have the ability to view all data at one time on the screen.
33. John Bauckman requested that we add a COMPLETED flag that would freeze costs and this flag would also show up on the IU Level reporting Dan Soper also wanted to use this flag to freeze OFFICIAL COSTS. John Bauckman suggested that we think about this request before taking action. (Norm will call John B on this item and discuss, Ken Rowe will research).
34. A request was made to place the IU RETRIEVE button on the INSPECTION ASSET LIST (see enhancement 914). (Ken Rowe has completed this request)
35. A request was made to place the LIST of ENHANCEMENTS on the CAS website, so that field users could see completions and open items.
36. Tonya recommended that CAIS Web eliminate left-right (horizontal) scrolling, to speed up data entry and viewing of data.
37. Ken Baker concluded that the CAS website should be used for marketing and (some) communication purposes and that CAIS Web website be used for internal communications. Users liked option #5 of Ken Baker's designs for the CAS home page. (-The CAIS Web home or portal screen that Ken Baker demonstrated will follow the CAIS Web login screen. It may duplicate some news items contained in the CAS home page. [kcb])
38. Dennis McDermitt suggested that the CAIS User Guide be hyperlinked to corresponding fields on the CAIS website.
39. Norm said that the CAIS Web Entrust Certificate should be working within one month. Ken Rowe asked Dennis McDermitt to help with the technical aspects of this.
40. John Elrod asked for better integration between CAIS and FIMS. This is his high-priority request. (Ken Rowe suggested that he create a site-definable trigger mechanism to implement this request).
41. Dan Soper reported that changing passwords in CAIS causes an error message and that the change does not always work. (Ken Rowe will fix this bug).
42. After the meeting, Ken Baker suggested that he develop a DATA DICTIONARY for the CAIS database. (Ken Baker will develop this item).

### **Day 3 - Thursday October 26, 2006**

1. Steve from Pantex did a presentation on the PANTEX FACILITY INFRASTRUCTURE.
2. Bob Gair, from RS Means, did a presentation on construction cost trends.
3. John Bauckman said that there are currently executive management review training sessions for FIMS and that there may be a need for this in CAIS. Ken Baker said that we should find

the management presentation that was done for Y-12. (Norm and Ken Baker will update the presentation and then send it to John Bauckman).

4. Roberto Reece and Dee Boyd gave a presentation on the Nevada Test Site's Facility and Infrastructure Assessment Report.
5. Dan Soper was retained by vote as the CAIS User Group chairperson for the coming year.
6. The next CAIS/CostWorks User Meeting will be held in the spring (April) at Las Vegas.